

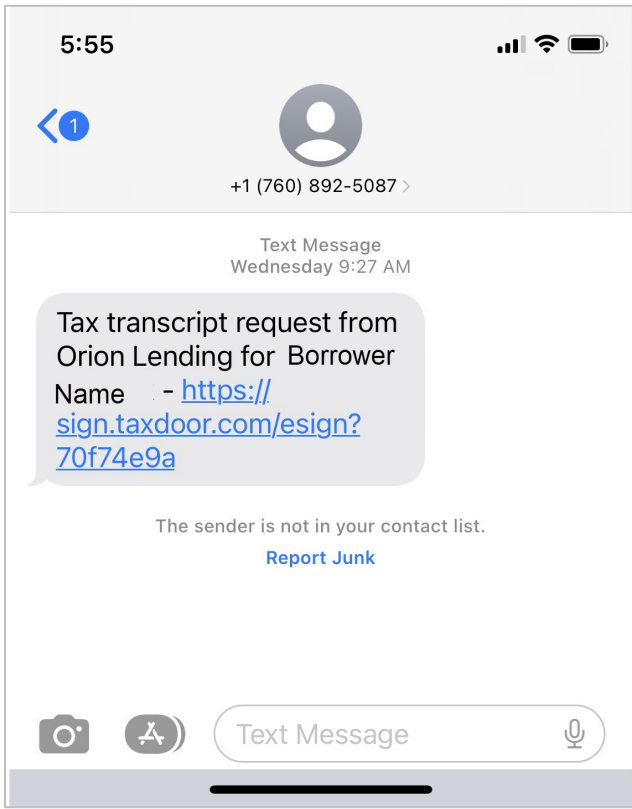
## Taxdoor 4506-C for Borrowers

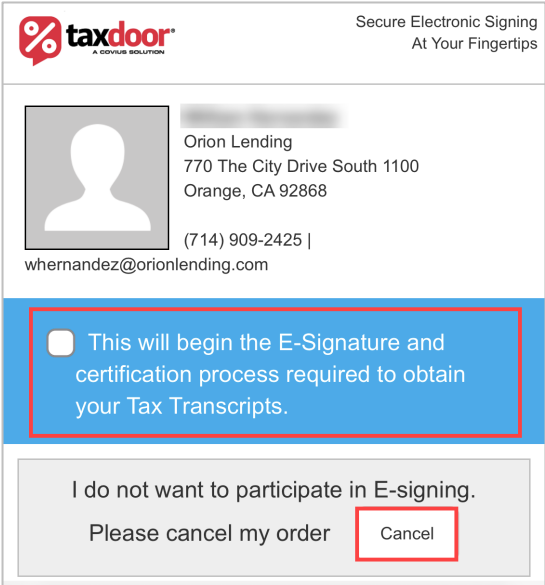
**Purpose:** Orion Lending requires a copy of the borrower’s tax transcript to complete a mortgage application. This guide will provide step-by-step instructions for the borrower to complete the tax transcripts process in Taxdoor successfully.

- For the mobile version, [click here](#).
- For the desktop version, [click here](#).



**Note:** If the Desktop and Mobile versions do not work for the borrower, the borrower can complete the [4506-C Form](#). Once wet signed, the broker can submit the completed 4506-C Form to their Account Manager.

### Mobile Version

Step	Action
1.	<p>Borrowers receive and open the <b>Text Message</b>. Click the <b>link</b> to launch <b>Taxdoor</b>.</p>  <p>The screenshot shows a text message interface on a mobile device. At the top, the time is 5:55 and there are icons for signal strength, Wi-Fi, and battery. Below the time is a back arrow with a '1' notification bubble and a contact profile icon. The contact name is '+1 (760) 892-5087'. The message content reads: 'Text Message Wednesday 9:27 AM' followed by a grey bubble containing the text: 'Tax transcript request from Orion Lending for Borrower Name - <a href="https://sign.taxdoor.com/esign?70f74e9a">https://sign.taxdoor.com/esign?70f74e9a</a>'. Below the message is the text 'The sender is not in your contact list.' with a 'Report Junk' link. At the bottom, there are icons for camera, voice recording, and a text input field labeled 'Text Message' with a microphone icon.</p>

Step	Action
<p>2.</p>	<p>Borrowers check the <b>This will begin the E-Signature and certification process required to obtain your Tax Transcripts</b> box.</p> <p><b>Note:</b> Selecting <b>Cancel</b> anytime throughout the process will cancel the entire order, and the broker or borrower will need to contact the Orion Representative in the email or Taxdoor screen to issue another request.</p> <div data-bbox="625 485 1166 1066" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;">  <p>Secure Electronic Signing At Your Fingertips</p> <p><b>taxdoor</b> A CONSUMER SOLUTION</p> <p>Orion Lending 770 The City Drive South 1100 Orange, CA 92868 (714) 909-2425   whernandez@orionlending.com</p> <p><input type="checkbox"/> This will begin the E-Signature and certification process required to obtain your Tax Transcripts.</p> <p>I do not want to participate in E-signing. Please cancel my order <input type="button" value="Cancel"/></p> </div>
<p>3.</p>	<p>Borrowers enter their <b>Social Security Number</b>, and click the <b>Verify</b> button.</p> <div data-bbox="617 1218 1172 1829" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><input checked="" type="checkbox"/> This will begin the E-Signature and certification process required to obtain your Tax Transcripts.</p> <p>This is an electronic authorization to allow <b>Orion Lending</b> to access your tax information from the IRS for: <b>David Hrcirik</b></p> <p>Verify Social Security Number</p> <p>ENTER MISSING DIGITS AND CLICK VERIFY</p> <p><input type="text"/> - <input type="text"/> - <b>0409</b> <input type="button" value="verify"/></p> <p>I do not want to participate in E-signing. Please cancel my order <input type="button" value="Cancel"/></p> </div>






Step	Action						
<p>4.</p>	<p>Borrowers confirm their <b>Current Address</b>, and click the <b>Verify</b> button to confirm the address is accurate, or the <b>Edit</b> button to make changes.</p> <div data-bbox="558 373 1235 785" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Verify Social Security Number</p> <p><b>xxx-xx-0409</b> </p> <hr/> <p>Verify Current Address</p> <div style="border: 1px solid red; padding: 2px; display: inline-block;">770 The City Drive South Orange, CA 92868</div> <div style="display: inline-block; margin-left: 20px;"> <div style="border: 1px solid red; padding: 2px; display: inline-block; background-color: #ccc;">edit</div> <div style="border: 1px solid red; padding: 2px; display: inline-block; background-color: #4CAF50; color: white; margin-left: 5px;">verify</div> </div> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #8B8732; color: white;"> <th style="width: 50%;">If</th> <th style="width: 50%;">Then</th> </tr> </thead> <tbody> <tr> <td>The address is correct</td> <td>Proceed to Step 6</td> </tr> <tr> <td>The address is <b>not</b> correct</td> <td>Proceed to Step 5</td> </tr> </tbody> </table>	If	Then	The address is correct	Proceed to Step 6	The address is <b>not</b> correct	Proceed to Step 5
If	Then						
The address is correct	Proceed to Step 6						
The address is <b>not</b> correct	Proceed to Step 5						
<p>5.</p>	<p>Borrowers enter the correct <b>Current Address</b>, and click the <b>Save and Verify</b> button. Click the <b>Yes</b> button.</p> <div style="display: flex; justify-content: space-between; align-items: flex-start; margin-top: 10px;"> <div data-bbox="342 1178 919 1856" style="width: 45%; border: 1px solid #ccc; padding: 10px;"> <p>Enter home address for tax year <span style="float: right;">✕</span> 2021</p> <p><input type="checkbox"/> Copy address from current address.</p> <div style="border: 1px solid red; padding: 2px; margin-bottom: 5px;">770 The City Drive S</div> <div style="display: flex; margin-bottom: 5px;"> <div style="border: 1px solid #ccc; padding: 2px; width: 50px; text-align: center;">92868</div> <div style="border: 1px solid #ccc; padding: 2px; width: 150px; text-align: center;">Orange</div> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; display: flex; justify-content: space-between;"> <span>California</span> <span>◇</span> </div> <div style="display: flex; justify-content: flex-end; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; margin-right: 10px;">Close</div> <div style="border: 1px solid red; padding: 5px; background-color: #4CAF50; color: white;">Save &amp; Verify</div> </div> </div> <div data-bbox="943 1184 1451 1856" style="width: 45%; border: 1px solid #ccc; padding: 10px; text-align: center;">  <h2 style="margin: 10px 0;">Are you sure?</h2> <p>Your current address is:</p> <p>770 The City Drive South Orange, CA 92868</p> <div style="display: flex; justify-content: center; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; margin-right: 10px; background-color: #ccc;">No</div> <div style="border: 1px solid red; padding: 5px; background-color: #4CAF50; color: white;">Yes</div> </div> </div> </div>						



Step	Action												
6.	<p>Borrowers confirm their <b>Tax Return Addresses</b> for each <b>Tax Year</b>. Click the <b>Verify</b> button to confirm the address is accurate, or the <b>Edit</b> button to make changes.</p> <div data-bbox="500 373 1295 684" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Verify Current Address</p> <p>770 The City Drive South Orange, CA 92868 <span style="float: right; color: green; font-size: 24px;">✓</span></p> <p>Verify Tax Return Addresses</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; text-align: center; font-size: 8px;">TAX YEAR</td> <td style="width: 60%; text-align: center; font-size: 8px;">ADDRESS USED ON TAX RETURN</td> <td style="width: 20%;"></td> </tr> <tr> <td style="text-align: center; font-weight: bold;">2022</td> <td style="text-align: center;">770 The City Drive South Orange, CA 92868</td> <td style="text-align: center;"> <div style="border: 1px solid #ccc; display: inline-block; padding: 2px 5px; margin-right: 5px;">edit</div> <div style="border: 1px solid #ccc; display: inline-block; padding: 2px 5px; background-color: #28a745; color: white;">verify</div> </td> </tr> </table> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #c0c0c0;"> <th style="width: 50%; text-align: center;">If</th> <th style="width: 50%; text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td>The address is correct for each Tax Year</td> <td>Proceed to Step 8</td> </tr> <tr> <td>The address is <b>not</b> correct for each Tax Year</td> <td>Proceed to Step 7</td> </tr> </tbody> </table>	TAX YEAR	ADDRESS USED ON TAX RETURN		2022	770 The City Drive South Orange, CA 92868	<div style="border: 1px solid #ccc; display: inline-block; padding: 2px 5px; margin-right: 5px;">edit</div> <div style="border: 1px solid #ccc; display: inline-block; padding: 2px 5px; background-color: #28a745; color: white;">verify</div>	If	Then	The address is correct for each Tax Year	Proceed to Step 8	The address is <b>not</b> correct for each Tax Year	Proceed to Step 7
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7.	<p>Borrowers confirm the address for that <b>Tax Year</b> is correct.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #c0c0c0;"> <th style="width: 50%; text-align: center;">If</th> <th style="width: 50%; text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td>The address is correct for the Tax Year</td> <td> <ul style="list-style-type: none"> <li>Click the <b>Save &amp; Verify</b> button</li> <li>Proceed to Next Step</li> </ul> </td> </tr> <tr> <td>The address is <b>not</b> correct for the Tax Year.</td> <td> <ul style="list-style-type: none"> <li>Uncheck the <b>Copy Address from current address</b> and update the <b>Address</b></li> <li>Click the <b>Save &amp; Verify</b> button</li> <li>Proceed to Next Step</li> </ul> </td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="width: 45%;"> <p><i>Example: Address is Correct</i></p> <div data-bbox="334 1562 867 1827" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Enter home address for tax year 2022 <span style="float: right; font-size: 12px;">✕</span></p> <p><input checked="" type="checkbox"/> Copy address from current address.</p> <p>770 The City Drive South Orange, CA 92868</p> <p style="text-align: right;"> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Close</span> <span style="border: 1px solid #ccc; padding: 2px 5px; background-color: #28a745; color: white;">Save &amp; Verify</span> </p> </div> </div> <div style="width: 45%;"> <p><i>Example: Address is Not Correct</i></p> <div data-bbox="935 1562 1425 1856" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Enter home address for tax year 2022 <span style="float: right; font-size: 12px;">✕</span></p> <p><input type="checkbox"/> Copy address from current address.</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">1234 Any Drive</div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <div style="border: 1px solid #ccc; padding: 2px; width: 20%;">92868</div> <div style="border: 1px solid #ccc; padding: 2px; width: 30%;">Orange</div> <div style="border: 1px solid #ccc; padding: 2px; width: 20%;">California <span style="font-size: 10px;">▼</span></div> </div> <p style="text-align: right;"> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Close</span> <span style="border: 1px solid #ccc; padding: 2px 5px; background-color: #28a745; color: white;">Save &amp; Verify</span> </p> </div> </div> </div>	If	Then	The address is correct for the Tax Year	<ul style="list-style-type: none"> <li>Click the <b>Save &amp; Verify</b> button</li> <li>Proceed to Next Step</li> </ul>	The address is <b>not</b> correct for the Tax Year.	<ul style="list-style-type: none"> <li>Uncheck the <b>Copy Address from current address</b> and update the <b>Address</b></li> <li>Click the <b>Save &amp; Verify</b> button</li> <li>Proceed to Next Step</li> </ul>						
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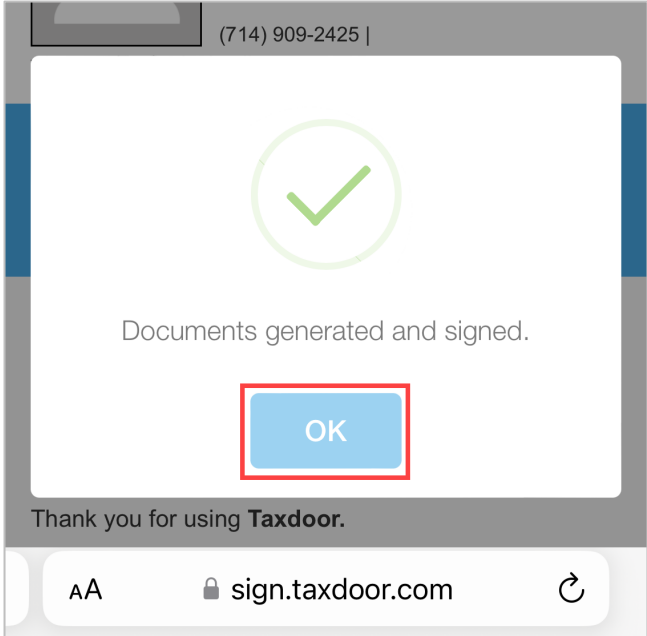
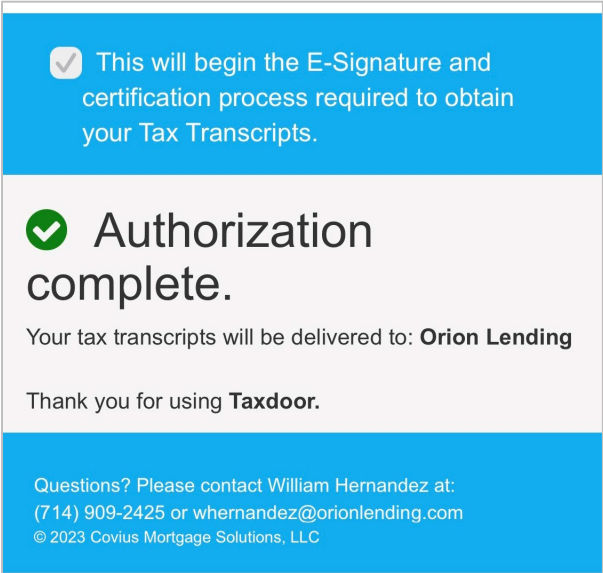


Step	Action						
8.	<p>Once all addresses are confirmed, borrowers check the <b>I agree to use Electronic Records &amp; Signatures</b> box.</p> <div data-bbox="548 373 1247 926" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: 80%;"> <p style="text-align: center;"><b>Verify Tax Return Addresses</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;"><small>TAX YEAR</small></td> <td style="width: 40%;"><small>ADDRESS USED ON TAX RETURN</small></td> <td style="width: 30%; text-align: right;"></td> </tr> <tr> <td><b>2021</b></td> <td><b>770 The City Drive S Orange, CA 92868</b></td> <td></td> </tr> </table> <div style="border: 2px solid red; padding: 5px; margin: 10px 0; background-color: #4a90e2; color: white; text-align: center;"> <input type="checkbox"/> I agree to use Electronic Records &amp; Signatures         </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; background-color: #f0f0f0;"> <p style="text-align: center;">I do not want to participate in E-signing. Please cancel my order <span style="float: right; border: 1px solid #ccc; padding: 2px 10px; border-radius: 4px;">Cancel</span></p> </div> </div>	<small>TAX YEAR</small>	<small>ADDRESS USED ON TAX RETURN</small>		<b>2021</b>	<b>770 The City Drive S Orange, CA 92868</b>	
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Step	Action
<p>9.</p>	<p>Borrowers scroll through the entire agreement, and add their e-signature by clicking the <b>I authorize Orion Lending to order 4506-C and sign now</b> button.</p> <p><b>Note:</b> Selecting <b>Cancel</b> anytime throughout the process will cancel the entire order, and the broker or borrower will need to contact the Orion Representative in the email or Taxdoor screen to issue another request.</p> <div data-bbox="602 487 1190 1524" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Please read the terms of service below and click the Agree checkbox above to continue. If you wish to not participate in Electronic signing of your documents please click the Cancel Order button below.</p> <p><b>IMPORTANT: Please scroll through and read the ENTIRE agreement in order to Authorize your E-Signature.</b></p> <div data-bbox="643 730 1138 1182" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>You may opt out of this consent by clicking the "Cancel" button. Even after your consent, you may still request paper copies of the IRS forms to be delivered to you in paper or non-electronic form by calling the number below, or by writing to us at the address listed below.</p> <p><b>Contact Information</b>                      (714) 909-2425                      Orion Lending                      770 The City Drive South 1100                      Orange, CA 92868</p> </div> <p><b>Provide Authorization</b></p> <p>I declare that I am either the taxpayer whose name is <input type="text"/>, or a person authorized to release the tax information requested. If the request applies to a joint return, I attest that I am a spouse. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters planner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute</p> <p style="text-align: center;"><a href="https://sign.taxdoor.com">sign.taxdoor.com</a></p> </div> <div data-bbox="505 1581 1292 1671" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0; text-align: center;"> <div style="display: flex; justify-content: space-around; align-items: center;"> <div data-bbox="516 1591 1149 1661" style="border: 2px solid red; padding: 5px; background-color: #4CAF50; color: white; text-decoration: none; font-weight: bold;">I authorize Orion Lending to order 4506-C and sign now</div> <div data-bbox="1154 1591 1284 1661" style="border: 1px solid #ccc; padding: 5px; text-decoration: none;">Cancel</div> </div> </div>



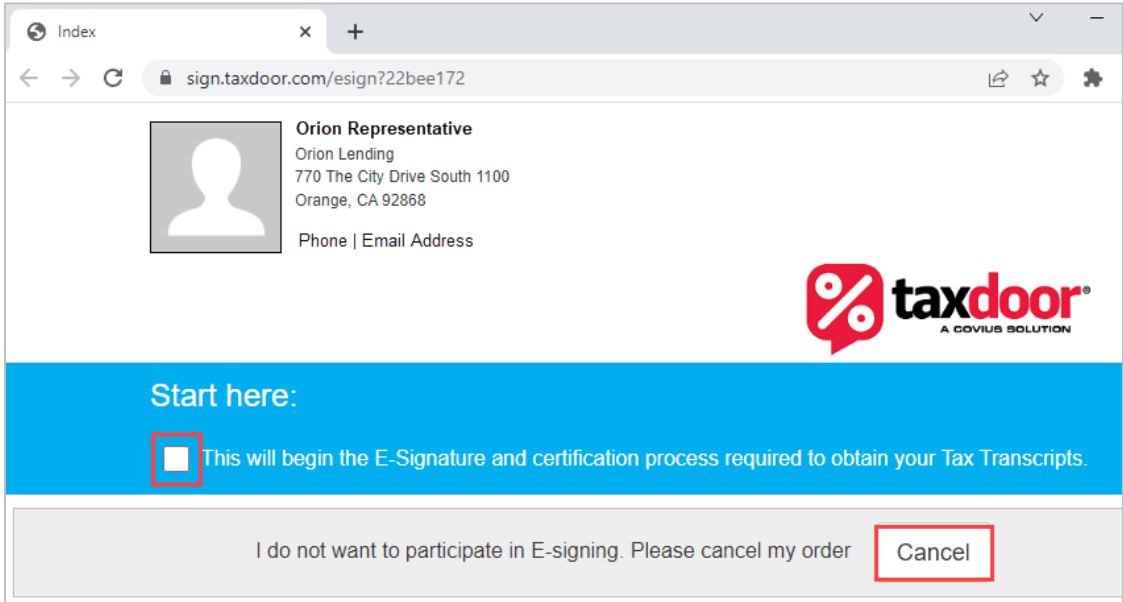
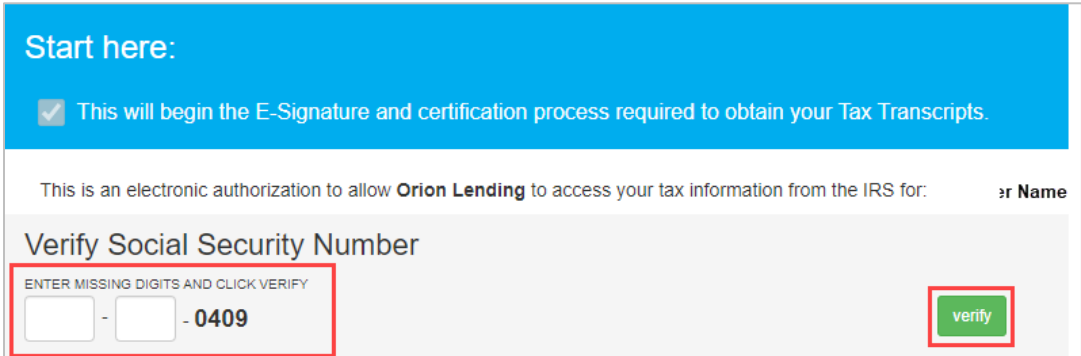
Step	Action
11.	<p>Borrowers click the <b>OK</b> button to confirm that the documents have been generated and signed.</p> 
12.	<p>The <i>Authorization Complete</i> screen populates.</p> 
<p><b>Congratulations!</b>  <b>The Tax Transcripts have been authorized to be ordered by Orion Lending!</b></p>	



## Desktop Version

Step	Action
1.	<p>Borrowers open the email from <b>Orion Lending &lt;notice@taxdoor.com&gt; E-Signature Request (Borrower-pending E-signature)</b>, and click the <b>Link</b> provided.</p> <div data-bbox="337 464 1453 1033" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>[EXTERNAL EMAIL- Caution] RE: E-Signature Request (Borrower-pending E-signature)</p> <p> Orion Lending &lt;notice@taxdoor.com&gt; To: Borrower Name</p> <p><small>This message was sent with High importance.</small></p> <p> <b>taxdoor</b> <small>A COVULUS SOLUTION</small></p> <p><b>CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.</b></p> <p>Orion Lending requires a copy of your tax transcripts to complete your mortgage application.</p> <p>Authorization needed for: Borrower Name</p> <p>Please complete your online authorization by clicking here: <a href="https://sign.taxdoor.com/esign?221" style="border: 1px solid red; padding: 2px;">https://sign.taxdoor.com/esign?221</a></p> <p>If you have any questions, please contact me.</p> <p>Orion Representative Orion Lending 770 The City Drive South 1100 Orange, CA 92868 Phone   Email Address</p> </div> <p><b>Note:</b> Borrowers have the option to complete the request on their cell phone if Taxdoor is initiated from the email on the mobile device.</p>



Step	Action
<p>2.</p>	<p>Borrowers check the <b>This will begin the E-Signature and certification process required to obtain your Tax Transcripts</b> box.</p> <p><b>Note:</b> Selecting <b>Cancel</b> anytime throughout the process will cancel the entire order, and the broker or borrower will need to contact the Orion Representative in the email or Taxdoor screen to issue another request.</p> 
<p>3.</p>	<p>Borrowers enter their <b>Social Security Number</b>, and click the <b>Verify</b> button.</p> 



Step	Action						
<p>4.</p>	<p>Borrowers confirm their <b>Current Address</b>, and click the <b>Verify</b> button to confirm the address is accurate, or the <b>Edit</b> button to make changes.</p> <div data-bbox="354 373 1438 701" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>Verify Social Security Number</p> <p><b>xxx-xx-0409</b> <span style="float: right; color: green; font-size: 24px;">✓</span></p> <hr/> <p>Verify Current Address</p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid red; padding: 2px;">770 The City Drive Orange, CA 92868</div> <div style="border: 1px solid red; padding: 2px; display: flex; gap: 5px;"> <span style="background-color: #ccc; padding: 2px 5px;">edit</span> <span style="background-color: #4CAF50; color: white; padding: 2px 5px;">verify</span> </div> </div> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr style="background-color: #D4AF37; color: white;"> <th style="width: 50%;">If</th> <th style="width: 50%;">Then</th> </tr> </thead> <tbody> <tr> <td>The address is correct</td> <td>Proceed to Step 6</td> </tr> <tr> <td>The address is <b>not</b> correct</td> <td>Proceed to Step 5</td> </tr> </tbody> </table>	If	Then	The address is correct	Proceed to Step 6	The address is <b>not</b> correct	Proceed to Step 5
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<p>5.</p>	<p>Borrowers enter the correct <b>Current Address</b>, and click the <b>Save and Verify</b> button. Click the <b>Yes</b> button to save.</p> <div style="display: flex; justify-content: space-around; align-items: flex-start;"> <div data-bbox="354 1100 1091 1491" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>Enter your current address <span style="float: right; font-size: 18px;">✕</span></p> <div style="border: 1px solid red; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%; border: 1px solid green;" type="text" value="770 The City Drive South"/> </div> <div style="display: flex; justify-content: space-between; border: 1px solid red; padding: 5px;"> <input style="width: 15%; border: 1px solid #ccc;" type="text" value="92868"/> <input style="width: 35%; border: 1px solid #ccc;" type="text" value="Orange"/> <div style="border: 1px solid #ccc; padding: 2px;">California <span style="font-size: 12px;">▼</span></div> </div> <div style="display: flex; justify-content: flex-end; margin-top: 10px;"> <span style="background-color: #ccc; padding: 5px 10px; margin-right: 10px;">Close</span> <span style="background-color: #4CAF50; color: white; padding: 5px 10px; border: 1px solid red;">Save &amp; Verify</span> </div> </div> <div data-bbox="1140 1100 1438 1491" style="border: 1px solid #ccc; padding: 10px; text-align: center;"> <div style="font-size: 48px; color: #FF9800; margin-bottom: 10px;">!</div> <p style="font-weight: bold; font-size: 24px;">Are you sure?</p> <p>Your current address is:</p> <p>770 The City Drive South Orange, CA 92868</p> <div style="display: flex; justify-content: center; margin-top: 10px;"> <span style="background-color: #ccc; padding: 5px 10px; margin-right: 10px;">No</span> <span style="background-color: #4CAF50; color: white; padding: 5px 10px; border: 1px solid red;">Yes</span> </div> </div> </div>						

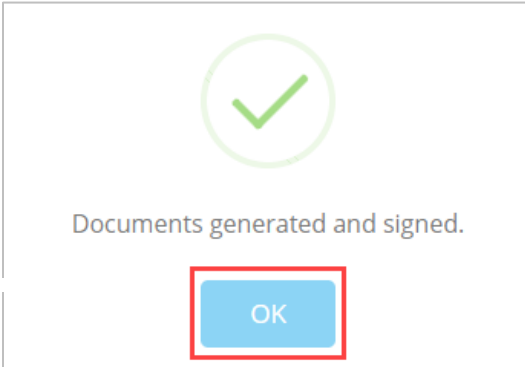
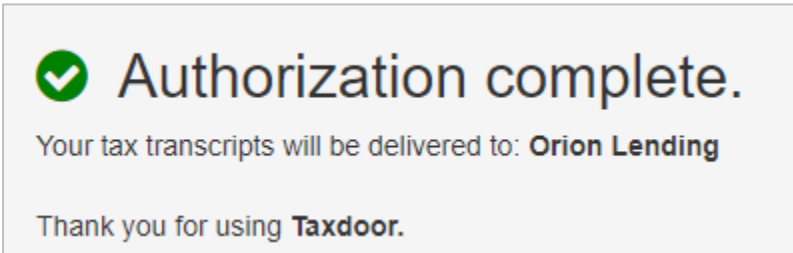


Step	Action									
6.	<p>Borrowers confirm their <b>Tax Return Addresses</b> for each <b>Tax Year</b>. Click the <b>Verify</b> button to confirm the address is accurate, or the <b>Edit</b> button to make changes.</p> <div data-bbox="586 373 1203 615" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Verify Current Address</p> <p>770 The City Drive South Orange, CA 92868 <span style="float: right; color: green;">✓</span></p> <hr/> <p>Verify Tax Return Addresses</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 2px;">TAX YEAR <b>2022</b></td> <td style="padding: 2px;">ADDRESS USED ON TAX RETURN 770 The City Drive South Orange, CA 92868</td> <td style="text-align: right; padding: 2px;"> <input type="button" value="edit"/> <input type="button" value="verify"/> </td> </tr> </table> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #c0c0c0;"> <th style="width: 50%; text-align: center;">If</th> <th style="width: 50%; text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td>The address is correct for each Tax Year</td> <td>Proceed to Step 8</td> </tr> <tr> <td>The address is <b>not</b> correct for each Tax Year</td> <td>Proceed to Step 7</td> </tr> </tbody> </table>	TAX YEAR <b>2022</b>	ADDRESS USED ON TAX RETURN 770 The City Drive South Orange, CA 92868	<input type="button" value="edit"/> <input type="button" value="verify"/>	If	Then	The address is correct for each Tax Year	Proceed to Step 8	The address is <b>not</b> correct for each Tax Year	Proceed to Step 7
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If	Then									
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7.	<p>Borrowers confirm the address for that <b>Tax Year</b> is correct.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #c0c0c0;"> <th style="width: 50%; text-align: center;">If</th> <th style="width: 50%; text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td>The address is correct for the Tax Year</td> <td> <ul style="list-style-type: none"> <li>Click the <b>Save &amp; Verify</b> button</li> <li>Proceed to Next Step</li> </ul> </td> </tr> <tr> <td>The address is <b>not</b> correct for the Tax Year.</td> <td> <ul style="list-style-type: none"> <li>Uncheck the <b>Copy Address from current address</b> and update the <b>Address</b></li> <li>Click the <b>Save &amp; Verify</b> button, and click <b>Yes</b> to confirm the address change</li> <li>Proceed to Next Step</li> </ul> </td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="width: 45%;"> <p><i>Example: Address is Correct</i></p> <div data-bbox="334 1562 867 1827" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Enter home address for tax year 2022 <span style="float: right;">✕</span></p> <p><input checked="" type="checkbox"/> Copy address from current address.</p> <p>770 The City Drive South Orange, CA 92868</p> <p style="text-align: right;"> <input type="button" value="Close"/> <input style="border: 2px solid red;" type="button" value="Save &amp; Verify"/> </p> </div> </div> <div style="width: 45%;"> <p><i>Example: Address is Not Correct</i></p> <div data-bbox="935 1556 1425 1856" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Enter home address for tax year 2022 <span style="float: right;">✕</span></p> <p><input type="checkbox"/> Copy address from current address.</p> <div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;">1234 Any Drive</div> <p>92868    Orange    California ▾</p> <p style="text-align: right;"> <input type="button" value="Close"/> <input style="border: 2px solid red;" type="button" value="Save &amp; Verify"/> </p> </div> </div> </div>	If	Then	The address is correct for the Tax Year	<ul style="list-style-type: none"> <li>Click the <b>Save &amp; Verify</b> button</li> <li>Proceed to Next Step</li> </ul>	The address is <b>not</b> correct for the Tax Year.	<ul style="list-style-type: none"> <li>Uncheck the <b>Copy Address from current address</b> and update the <b>Address</b></li> <li>Click the <b>Save &amp; Verify</b> button, and click <b>Yes</b> to confirm the address change</li> <li>Proceed to Next Step</li> </ul>			
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Step	Action						
8.	<p>Once all addresses are confirmed, borrowers check the <b>I Agree to use Electronic Records &amp; Signatures</b> box.</p> <div data-bbox="467 373 1321 667" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><b>Verify Tax Return Addresses</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;"><small>TAX YEAR</small></td> <td style="width: 40%;"><small>ADDRESS USED ON TAX RETURN</small></td> <td style="width: 30%; text-align: right;"></td> </tr> <tr> <td><b>2022</b></td> <td><b>1234 Any Drive Orange, CA 92868</b></td> <td></td> </tr> </table> <div style="border: 1px solid #00aaff; padding: 5px; margin-top: 10px; display: flex; align-items: center;"> <input style="margin-right: 10px;" type="checkbox"/> I agree to use Electronic Records &amp; Signatures         </div> </div>	<small>TAX YEAR</small>	<small>ADDRESS USED ON TAX RETURN</small>		<b>2022</b>	<b>1234 Any Drive Orange, CA 92868</b>	
<small>TAX YEAR</small>	<small>ADDRESS USED ON TAX RETURN</small>						
<b>2022</b>	<b>1234 Any Drive Orange, CA 92868</b>						
9.	<p>Borrowers scroll through the entire agreement, and add their e-signature by clicking the <b>I authorize Orion Lending to order 4506-C and sign now</b> button.</p> <p><b>Note:</b> Selecting <b>Cancel</b> anytime throughout the process will cancel the entire order, and the broker or borrower will need to contact the Orion Representative in the email or Taxdoor screen to issue another request.</p> <div data-bbox="410 963 1382 1862" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="background-color: #00aaff; color: white; padding: 5px; display: flex; align-items: center;"> <input checked="" type="checkbox"/> I agree to use Electronic Records &amp; Signatures         </div> <p style="font-size: small; margin-top: 10px;">Please read the terms of service below and click the Agree checkbox above to continue. If you wish to not participate in Electronic signing of your documents please click the Cancel Order button below.</p> <p><b>IMPORTANT: Please scroll through and read the ENTIRE agreement in order to Authorize your E-Signature.</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="font-size: small;">Please read this Federal ESIGN Disclosure and Consent carefully and keep a copy for your records. This disclosure is required by the federal Electronic Signatures in Global and National Commerce Act ("ESIGN").</p> <p style="font-size: small;">Thank you for considering Orion Lending for your lending needs. To serve you better we have provided you with a secure platform through which you can electronically authorize the release of your tax records from the IRS. This information is used for the purpose of verifying certain information on your loan application.</p> <p style="font-size: small;">This disclosure document is your consent to electronically authorize the IRS to release your tax records to Orion Lending and to receive copies of your digitally signed IRS Form 4506-C electronically. Your consent also confirms that you meet the following software and hardware requirements:</p> </div> <p style="font-weight: bold; margin-top: 10px;">Provide Authorization</p> <p style="font-size: small;">I declare that I am either the taxpayer whose name is David Hrncrik, or a person authorized to release the tax information requested. If the request applies to a joint return, I attest that I am a spouse. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters planner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-C on behalf of the taxpayer.</p> <p style="font-size: small;">Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-C.</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="border: 1px solid #00aaff; padding: 5px; background-color: #00aaff; color: white; text-align: center;">I authorize Orion Lending to order 4506-C and sign now</div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f0f0f0; text-align: center;">Cancel</div> </div> </div>						



Step	Action
10.	<p>Borrowers click the <b>OK</b> button to confirm that the Documents have been generated and signed.</p> <div data-bbox="634 373 1156 737" style="border: 1px solid #ccc; padding: 20px; text-align: center;">  </div>
11.	<p>The <i>Authorization Complete</i> screen populates.</p> <div data-bbox="501 886 1289 1136" style="border: 1px solid #ccc; padding: 20px; text-align: center;">  </div>
<p><b>Congratulations!</b>  <b>The Tax Transcripts have been authorized to be ordered by Orion Lending!</b></p>	

